



*Participant
Notebook*

Week 5:
The “Big Ask”

PURPOSE OF THIS NOTEBOOK

This notebook is for you to use while reviewing the key concepts in the online modules, take notes, and complete the reflective activities. Note you will be submitting a copy of the *Advocacy Work Plan* (separate document) to your Online Facilitator at the end of the week to get their feedback; you do not need to submit this document to them.

WEEK 5's PURPOSE

The purpose of this week is to pull the previous weeks' content together (*creating the message, based upon data and stories, effective leadership communication skills, and leveraging teams and networks for advocacy*) and focus on how to effectively ask for public funds.

WEEK 5's GOALS

- 1** Review (at a high-level) the ways that the requests for public funds are made within communities and who the “competition” is for these funds
- 2** Discuss some specific steps libraries can take to help make your public funding budget presentation more compelling
- 3** Explore the concept of “priorities” and how this impacts the library's budget and request or public funds

WEEK 5's WEB-BASED MODULE

- 1** “Show Me the Money”

PART I: Introduction to Show Me the Money (in “Show Me the Money”)

Record your thoughts or the key concepts in the section of the online module in the space below.



Where did you rank your comfort level with the Annual Budget Process?



The Importance of Library Advocacy

Write or type your notes here



The Regional Nature of Things

Write or type your notes here



Final Module Thoughts

Write or type your notes here

PART II: Building Blocks to Budget Requests

Record your thoughts or the key concepts in the section of the online module in the space below.



Identify Your Community's Priorities

What are the main funding priorities in your community?

- ☐ Education
- ☐ Public safety, like the fire department and the police department
- ☐ Road and transportation infrastructure, maintenance, and improvement
- ☐ Public health
- ☐ Economic development
- ☐ Parks and recreation
- ☐ Waste management



Considering Community Priorities

Write or type your notes here

- 1.** What are your community's priorities?
- 2.** How does the library meet these priorities?
- 3.** How do you help shape these priorities?



Considering Community Priorities

Write or type your notes here

What lessons did you learn from this part of the exercise?



Identify Your Funding Challenges

What are the main funding challenges in your community?

- ☐ A softening economy
- ☐ Cuts in state or county budgets
- ☐ Rising unemployment
- ☐ Falling property taxes
- ☐ Increasing competition for public funds

The 5 W's of Budgets



Who?

Write or type your notes here



What?

Write or type your notes here



Why?

Write or type your notes here



Where?

Write or type your notes here



When?

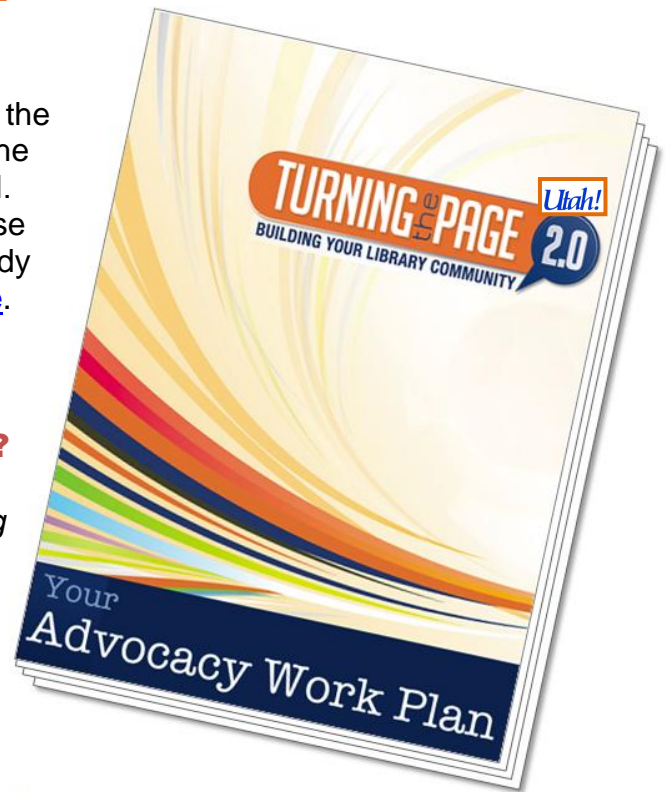
Write or type your notes here

PART III: Work Plan

Who Are Your Community Partners?



By now you should have downloaded the Work Plan (MS Word, 20 pgs.) from the *Turning the Page 2.0* Learner's Portal. After going through this module, please revisit section 8. If you have not already downloaded this document, click [here](#).



WAIT: DIDN'T WE DO THIS SECTION ALREADY?

Yes: you looked at this section last week (Week 4). However, use your new knowledge gained in the “The ‘Big Ask’” Online Module to edit or add to this section of your *Work Plan*.

Who is Your Target Audience?

Please revisit section 2 at this time.

WAIT: DIDN'T WE DO THIS SECTION ALREADY? Yes: you looked at this section last week (Week 1). However, use your new knowledge gained in the “The ‘Big Ask’” Online Module to edit or add to this section of your *Work Plan*.

What Do You Want Your Target Audience to Think of Your Library?

Please revisit section 4 at this time and then move on to Part IV, below.

WAIT: DIDN'T WE DO THIS SECTION ALREADY? Yes: you looked at this section in both Week 1 and Week 2. However, use your new knowledge gained in the “The ‘Big Ask’” Online Module to edit or add to this section of your *Work Plan*.

PART IV: Presenting a Budget Activity

Record your thoughts or the key concepts in the section of the online module in the space below.

How Should We Prepare for This Budget?



QUESTION 1: What should the group do to prepare for the budget process?

- ☐ Identify why the library needs and deserves the requested funds
- ☐ Be able to explain what difference the library does, and will, make in the lives of community residents
- ☐ Do some initial probing to find out whether the decision makers will support the library's funding request
- ☐ Determine how will these increased funds improve service overall
- ☐ Be able to explain how the current budget was spent
- ☐ Determine the consequences to the community of the library not receiving increased funds

Preparing to Make the Budget Proposal

Consider these questions before making a budget proposal:



- Are you able to explain why the library needs and deserves the requested funds?
- What difference does, and will the library make in the lives of community residents?
- Are you able to explain how the current budget was spent?
- How will these increased funds improve service overall?
- What statistics will you use? Do they support your position? Are they clear and unambiguous?
- Have you asked for input from those who successfully submit budget proposals year after year?
- Perhaps you might consider asking for input from your budget director?
- Might you enlist board members of community volunteers who have expertise in this area for their help?



QUESTION 2: To what extent should trustees and library staff who are not involved in the budget proposal process be made aware of what is happening?

- ☐ *It depends on their level of involvement, but at the very least they should be able to answer general questions about the process and understand the library's priorities and how the library fits into the community's priorities.*
- ☐ *Because informing the staff and trustees about the budget conversation may be interpreted as an invitation for their input, it's better for the efficiency of the project that things are kept as low profile as possible. Trustees and staff don't need to know what's going on with the budget process.*
- ☐ *All trustees and supporters should receive detailed and frequent information. Minutes of each project meeting should be disseminated to all interested staff members and trustees within a day or two of each meeting.*

Which one did you pick? Which one **SHOULD** you pick?



We know that our budget proposal should show “why” we need the amount of funding that we are requesting. We need to do that in as interesting a way as possible. Anecdotes will show the human side of the library. I think the raw research and data will be boring and our audience will tune us out.

Choose this answer



The most effective budget proposal will integrate data and facts that will logically show how the library impacts the community and anecdotes to provide examples of the way that the library can help individuals.

Choose this answer



Budgeting decisions are made based on logical considerations of how much return the community will get on the investment made by the budget. We need as much research and data as we can get. Because of that, things like anecdotes and inspirational stories could make it look like we're trying to cover up a lack of substance to our message.

Choose this answer



Best Practices: Preparing the Budget Proposal

Consider these questions before making your budget request:

- *Is the budget proposal clearly written and easy to understand?*
- *Do the charts and graphs support your arguments?*
- *Can you present anecdotes of the impact of library services on individuals?*
- *Is everything neatly done and easy to understand? Is it accurate?*
- *Have you provided the decision maker with a “heads up” of what to expect?*



QUESTION 3: What criteria should the team use to determine whether they are ready to present their budget?

- ☐ *We’ve done all the necessary prep work by finding out who our audience is and what their priorities are. We’re ready to go.*
- ☐ *Earlier, we figured out who we’re presenting to and what’s important to them. Now we need to make sure that our presentation has been polished and figure out how we’re going to handle any questions that might pop up during the presentation. Then we’ll be ready.*
- ☐ *We’ve already done most of the heavy lifting getting the presentation ready, so now we should run our proposal by our audience before we officially present it so that we know where the stumbling blocks are. After we’ve identified those obstacles, we’ll be ready.*



Best Practices: Making the Presentation

Consider these questions before delivering the proposal:

- *Do you know who you will be presenting to?*
- *What’s important to them?*
- *What will be the format of the presentation? (Written only? Will you have a chance to speak?)*
- *Who on your team will take the lead on answering any questions?*
- *If this is an oral presentation, have the person who is making the presentation practice it several times in front of people you trust to give constructive feedback.*
- *If the proposal is written, get several key people you can trust to review it and provide feedback.*



QUESTION 4: How should the project team respond to this news [that the library won't be able to get any additional funding in the next fiscal year]?

- ☐ The team should quietly accept the city council's decision. They do not want to run the risk of antagonizing them and jeopardizing future funding.
- ☐ The team should write a letter to the editor of the local paper explaining the library's side of the situation to clear up any confusion.
- ☐ The team should graciously ask “why” and enlist the city council's advice on how to improve their proposal for next year.



Graciously Ask Why

Best Practices: Dealing with a “No”

Graciously Ask Why

Write or type your notes here



Use “I” Statements

Best Practices: Dealing with a “No”

Use “I” Statements

Write or type your notes here



Brainstorm
Other Resources

Best Practices: Dealing with a “No”

Brainstorm Other Resources

Write or type your notes here



QUESTION 5: What are the next steps following the approval of their funding requests?

- ☐ *They should develop a plan to provide periodic updates on how the funds are helping the library better serve the community.*
- ☐ *They library should negotiate for even more funding.*



Best Practices: Doing Follow Up

Consider these steps after receiving your requested funds:

- *Even when you’ve delivered a successful budget request, there’s still some work to do.*
- *Make sure that you have a plan to provide periodic updates on how the funds are helping the library better serve the community.*
- *Always remember to say “thank you” for their past support and for their consideration of your budget request!*

WEEK 5 REFLECTION QUESTIONS

Each week you will be asked to reflect on the information presented in the online modules. Please enter your responses in the space provided.

1

In the online module and on Page 5 of this workbook we identified some of the current challenges with requesting public funds. Brainstorm what are some of the other challenges that you are facing in your community?

2

In the section of the online module, “The 5 W’s of Budgets,” the first “W” is for “Who.” In your community who is in the “who” ... meaning who is involved in the request for public funds?

3

When you make the request for public funds, how do you make sure your “team” (library leader, staff, trustees, Friends group) are all on the “same page”? What happens if they are not?

4

You have just been told every budget - including the library’s - will be cut 20% next year. How do you react to this? What should you do? How can the concepts from Week 5 help?

WEEK 5 CHECK LIST

Use the checklist below to be sure you’ve completed all assignments for Week 5 and to begin preparing for Week 6: “So Now What?”.

☐

Review the **online module** for Week 5: “Show Me the Money”

☐

Revisit the **Advocacy Work Plan** sections listed in this Participant Notebook for Week 5 (Sections 2, 4 & 8). Submit your *Advocacy Work Plan* to your Online Facilitator via email by the date they specify.

☐

Participate in your weekly Online Virtual Classroom Session

☐

Complete the brief **“Goldilocks Questions”** for Week 5, accessible via the TtP2.0 Homepage.

☐

If desired, participate in the **Threaded Discussion Questions**, accessible via the TtP2.0 Homepage, or post any questions, comments or concerns you may have to the Discussion Board for your fellow cohort-mates to review and answer.

☐

Share what you’ve learned this week with others in your library!

☐

Note, while not your assignment for Week 5, next week (Week 6) we will be reviewing two online modules: **“Staying on Track”** and **What's Next?”**. If you want you can get a “jump” on this work and begin to review these modules at your own pace.

REMEMBER:

Advocacy is something we should be doing **every day** on behalf of our libraries ... inside its walls and out!

end!



Turning the Page 2.0 Utah! is a program of the Utah State Library, in cooperation with the Public Library Association, a division of the American Library Association. The *Turning the Page 2.0* logo and all related materials are used with permission from the Public Library Association.